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DEVELOPMENT TRENDS AND TERRITORIAL ORGANISATION OF THE MEDICAL TOURISM MARKET IN RUSSIA

Abstract: The article discusses the current state of affairs and issues related to the Russian medical tourism market. It is shown that medical tourism, as a component of health tourism, involves the organised travel of potential patients to medical clinics outside their country or region to receive qualified medical assistance at reasonable prices. Based on data from the global ranking of countries in medical tourism, it is established that Russia has achieved certain successes in the development of this sector of the green economy in the service industry over a relatively short period, but at the same time, there are numerous problems requiring resolution. The use of interdisciplinary and socio-geographical scientific approaches and methods has revealed modern challenges and risks in medical tourism, outlining strategic directions for its development, including for typical groups of Russian regions, megacities, and resort complexes. The dominant role of medical institutions in Moscow, St. Petersburg, and several other regional centre cities of the Russian Federation has been identified. Vector priorities for outbound medical tourism, including a shift in the interest of Russian citizens from European destinations to Southeast Asian ones while maintaining the role of Israel and certain European countries, have been determined. The formation of medical tourism clusters in regions and cities under conditions of public-private partnership is recommended. The strategic directions for the development of model groups of regions are proposed.

Key words: medical assistance, tourist flows, health services, medical clinics, strategic planning

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Introduction

Medical tourism, as a form of providing clinical services to patients coming from other regions and/or countries, was identified in scientific literature relatively recently – in the 1980s; previously, it was considered as part of balneological tourism, which originated in Ancient Greece and Ancient Rome, as well as in medieval Japan. During the Renaissance era (14th-17th centuries), the "salude per aqua" (SPA) – "health by water" – gained popularity in European countries. In the 18th and 19th centuries, a wide network of water-based health resorts was established in Europe, and in the 20th century, this type of service spread to other continents. With the emergence of high-tech biomedicine in the second half of the 20th century, the formation of a global information space, and improvements in transportation accessibility, people gained the opportunity to receive medical care beyond their place of residence - in other regions of their country and abroad. Thus, a new health-related component emerged – medical tourism.

In Russia, medical tourism emerged relatively recently – in the early 2000s. Over the years since then, a number of medical tourism destinations have been formed in the country, primarily in megapolises and major urban agglomerations. The development of this specific type of tourism in the country was further intensified during the COVID-19 period due to the arrival of foreigners for vaccination, as well as for receiving other types of medical assistance. During this time, scientific research in medical tourism became more active.

Authors publications on medical tourism were carried out within the framework of grants from the Russian Foundation for Basic Research (RFBR) (2019-2021) and the Russian Science Foundation (RSF) (2023-2024). The total number of our articles on this issue in Scopus, Web of Science, and RSCI databases exceeds 20. This article does not replicate those publications – it is aimed at comprehensively summarising fundamental and applied questions of the development and territorial organisation of medical tourism with a focus on the geographical specifics of the Russian Federation. In addition to primary information sources, we analysed numerous publications by Russian and foreign authors in general (Connell, 2013; Tsymbal & Consultant, 2014; Suess et al., 2018; Nikolskaya, 2019; Zhukovskaya & Krasnova, 2020; Khamadeeva, 2023; Stolz, 2023) and specific (Chemodanova et al., 2018; Bakulina & Kachkova, 2019; Marketing in medical tourism, 2020; Sharkova & Ananchenkova, 2022; Ilyina, 2022) specific issues of medical tourism development.

Materials and Methods

The most advanced countries in the field of medical tourism are the United Kingdom, Germany, Israel, India, Italy, Canada, France, Singapore and several others. Compared to these countries, Russia currently occupies a modest place in terms of the number of patients coming from other countries. What are the reasons for this situation, and what needs to be done to make the country more suitable for medical tourism? This article aims to find answers to these questions.

The study design involves examining outbound, domestic, and inbound medical tourism separately, as each of these subtypes is important for defining the landscape of medical tourism in Russia. During the study, we relied on systemic-structural, spatial, geositu-

ational, geopolitical, and problem-solving approaches and employed comparative, trend and time series analysis to examine the dynamics of medical tourism in Russia. Time series and trend analysis were employed to explore the temporal patterns and variations in medical tourism data, providing insights into patterns and shifts over time.

The information base of the study consists of data from Rosstat, Rosturizm (since 2022 - Ministry of Economic Development), and the Ministry of Health. Data from Marketing Research of Russian Medical Services Export provided by 71 regions of the Russian Federation. Data from IV National Congress of Medical Services Export for the 2023 year is available for seven months from January to July. Analysis of the interest of potential patients in foreign medical tourism destinations was conducted using the Wordstat data array – a tool for analysing search queries in Yandex. In contrast to the similar methodology used in the study by Petrova (2022), we introduced an additional query "Cost of treatment in..." alongside the key query "Treatment in...". This addition allows for a more focused comparison to determine changes in the dynamics of interest towards the medical tourism destination.

Results and Discussions

Russia in the world ranking of medical tourism

Russian citizens have the opportunity to receive medical care based on compulsory (free) and voluntary medical insurance. The implementation of such a combined model of state and private financing has simplified the choice of where to receive medical care, accelerated the development of the healthcare infrastructure, and provided positive shifts in the dynamics of public health (Chistobaev et al., 2019), opening up prerequisites for the development of inbound medical tourism. According to the global ranking of conditions for the development of medical tourism compiled by the Medical Tourism Association, Russia ranked 34th in 2015 (with an evaluation index of 57.01 out of 100), which can be considered a quite acceptable result for the initial stage of industry development. In terms of two sub-indices – firstly, indicators reflecting the level of economic development, safety, and the country's image, currency exchange rate profitability; and secondly, indicators of the score-index assessment of natural and cultural-historical attractiveness for tourists, treatment costs, and living expenses – our country held the same position in the same year. The combination of indicators reflecting healthcare standards, physician qualifications, and staff friendliness placed Russia in 31st place. However, in 2020, with an overall score of 60.17, Russia dropped to 41st place, indicating increased competition in the global medical tourism market (www.medicaltourismindex.com). Due to the pandemic and the established geopolitical situation, information regarding Russia's position in the global medical tourism ranking for subsequent years is not available.

Specifics of medical tourism

Unlike other forms of health tourism, medical tourism involves the patient staying not just in a health resort but in a clinic equipped with specialized equipment. The accommodation of medical tourists is possible outside the clinic as well – in hotels, boarding houses, sanatoriums, and private accommodations – which complicates the identification and statistical accounting of medical tourists. However, when studying the phenomenon of medical tourism, researchers also encounter other specific problems: 1) the organizers of this type of tourism include not only tour operators but also medical professionals: the

former provide the tourist with entry and exit arrangements, a package of non-medical services, including those outside the clinic, while the latter diagnose, treat, operate, consult, and with this distribution of functions, the efficiency of work increases; 2) information about medical tourists often is not directly available and has to be extracted from the data pool of clinic patients, as well as from reports or analytical reports of other healthcare organizations and tourist agencies; 3) statistics on the provision of medical care and health services to foreigners in Russia indicate that only about 5% of them are medical tourists (RST: The Share of Medical Tourists Does ..., 2023); 4) medical tourism encompasses not only medical institutions but also institutional hospitality infrastructure: visa issuance, insurance, banking services, legal assistance; 5) when working with foreign patients, ethics and confidentiality are particularly important, requiring the involvement of professional service providers.

The medical tourism industry faces numerous challenges, including an ageing population, economic crises, and geopolitical and epidemiological challenges. These factors create obstacles for international and domestic medical tourism, not only in terms of people's safety but also disruptions in the supply of medical equipment, problems with international financial transactions, and restrictions on the movement of specialists. For medical tourism, it is crucial to create a stable and reliable environment in which patients will feel confident and protected. Governmental and medical organizations should work on improving overall stability in the country and ensuring an adequate level of safety and quality of medical services for all tourists. In addition to this, it is necessary not only to remove existing barriers to increasing tourist flow through visa and travel regulation or language barrier elimination.

One of the current challenges for the medical tourism industry is the digitisation of healthcare and the associated development of remote consultation methods, which may reduce the frequency of tourist trips for diagnostic and clinical purposes. The number of telemedicine consultations under compulsory medical insurance in the "doctor-patient" format totalled about 9 million in 2023 (compared to 6.75 million in 2022); in addition, more than 2.5 million patients were under remote observation (Izvestia, 2023). There is also a "doctor-doctor" format for consultations based on diagnostic research results. Despite the overall positive impact on public health, such challenges and risks may reduce the flow of medical tourists.

Outbound medical tourism in Russia.

Outbound medical tourism, on the one hand, plays an important role in strengthening international relations and addressing social and medical issues, thus contributing to the exchange of experience and advanced healthcare technologies. On the other hand, it leads to the outflow of funds from the patient's country of residence. In Russia, this type of tourism has been negatively affected by factors such as the escalation of global geopolitics, the imposition of Western sanctions, and currency fluctuations. It is worth noting that even before, outbound travel for Russians for tourism purposes was not consistent: while before 2014, the number of Russian tourists during the winter holidays at foreign resorts was increasing by 10-13% annually, in subsequent years, it decreased by 30-35%. After 2022, a similar trend became characteristic for Russians travelling abroad for medical purposes to countries such as the UK, Germany, Canada, the USA, and Switzerland.

The analysis of Russian citizens' interest in treatment abroad was conducted based on secondary data using the key search queries “Treatment in...” («Лечение в...») and "Cost of treatment in..." («Стоимость лечения в ...») for several benchmark countries (see Fig. 1).

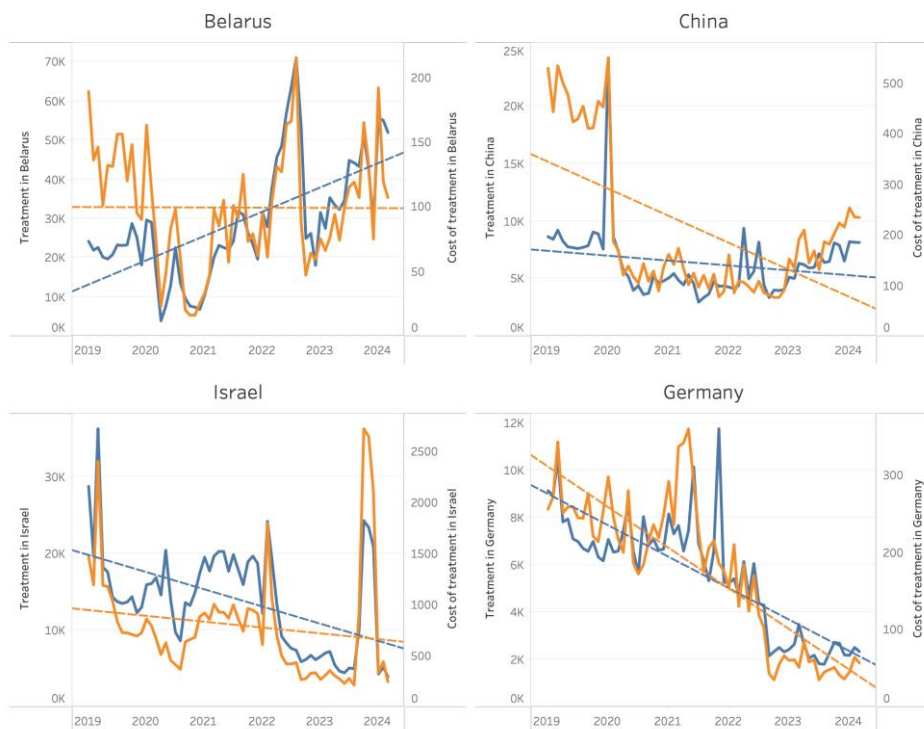


Fig. 1. Dynamics of queries for the keywords "Treatment in..." and "Cost of treatment in..." in the Yandex search engine from 2019 to March 2024. Orange colour - "Cost of treatment in..."; blue colour - "Treatment in...". Compiled by the authors based on Wordstat data (<https://wordstat.yandex.ru/>).

As we can see, some growth was observed only for Belarus, while other countries showed a downward trend. Of particular note is the sharp increase in indicators for Israel in October–December 2023 despite the tense geopolitical situation. It is worth noting that the growth dynamics of the query "Cost of treatment" is half that of "Treatment in," but the growth is still pronounced and deserves special attention. To reduce the influence of outlier values from COVID-19, we will additionally consider the period from January 2021 to March 2024 (Fig. 2).

In this case, we can see an increase in Russians' interest in receiving medical care in Belarus (with a clear peak in March–August 2022) and China, and the reasons are mostly geopolitical. Among other Asian countries, competition for the Russian medical tourism market includes India, Thailand, South Korea, Japan, and Singapore (Chandiramani, 2022). Relatively low treatment prices are inherent in India and Thailand (Petrova et al., 2024). As for specific types of treatment, in China and Belarus, patients are primarily interested in dentistry, while in Israel and Germany, oncology is the main focus.

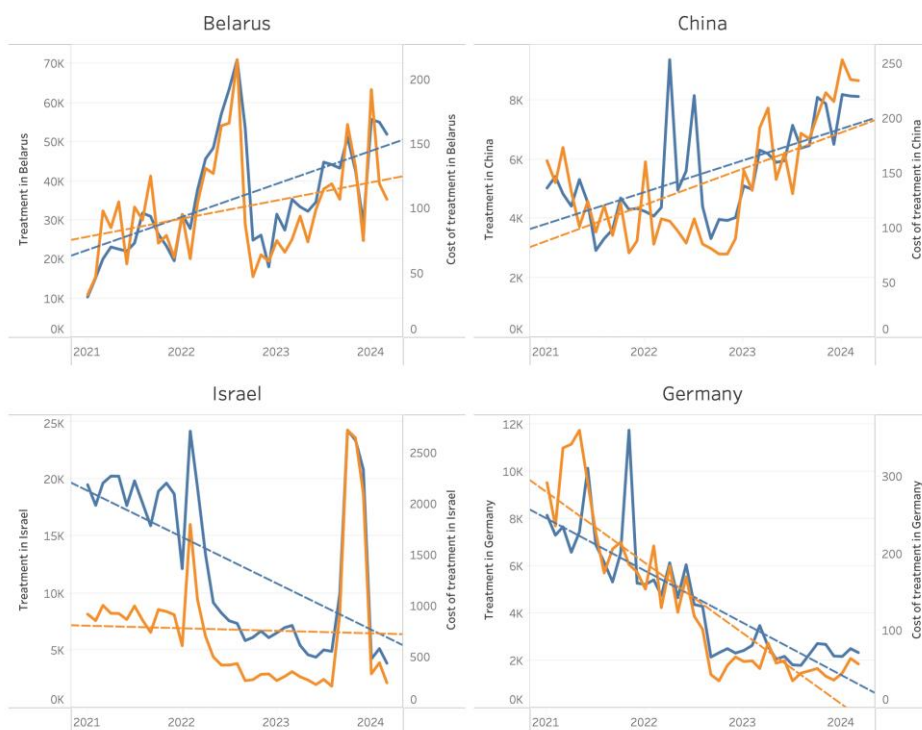


Fig. 2. Dynamics of queries for the keywords "Treatment in..." and "Cost of treatment in..." in the Yandex search engine from 2021 to March 2024. Orange colour - "Cost of treatment in..."; blue colour - "Treatment in...". Compiled by the authors based on Wordstat data.

Domestic medical tourism

The challenges associated with the pandemic and global geopolitics contribute to the growth of domestic medical tourism in Russia, which, along with other factors, indicates the recognition of achievements in domestic medicine and the presence of a developed network of health resorts in resort regions (Table 1). Alongside recreational resources, these facilities are characterised by developed medical tourism infrastructure, high qualifications of personnel, and the application of innovative technologies and techniques.

According to experts, more than 8 million people travel annually across Russia for medical and recreational purposes, with approximately 250,000 to 300,000 of them engaging in medical tourism. This trend is observed not only in Moscow and St. Petersburg but also in cities such as Kazan, Yaroslavl, Yekaterinburg, Novosibirsk, Nizhny Novgorod, Vladimir, Tula, and Tver (Mozokina, 2014; Zyukin et al., 2019). It is noteworthy that the cost of medical services in regional centres is approximately 35% lower than in the capitals. Pricing in the medical services market has peculiarities related to determining their resource intensity (Makarochkina & Sokolova, 2019).

The accessibility of the Russian medical tourism market is increasing with a systematic and structural approach to organising services for wide consumer groups. There is a reversal of travel goals in their requests: if previously medicine and tourism were considered as independent directions, they are now integrated into a unified

service concept. According to this concept, high-tech medical centres or clusters are being created at the national or regional level (Grudtsyn & Chistobaev, 2023). St. Petersburg has accumulated rich experience in the systematic formation of medical tourism clusters (Levterova, 2016).

Table 1. Types and geography of medical and recreational resorts in Russia.

Resort type	Description	Examples
Balneo-mud	The main healing factors are mineral waters and therapeutic muds	Anapa (Krasnodar Krai); Staraya Russa (Novgorod Oblast); Sestroretsk (Saint Petersburg); Marcial Waters (Republic of Karelia); Sergievskie Mineral Waters (Samara Oblast); Tinaki (Astrakhan Oblast); Lake Shira (Republic of Khakassia); Talaya (Magadan Oblast).
Balneoclimatic	The main healing factors are climate and mineral waters	Greater Sochi (Krasnodar region); Undory (Ulyanovsk region); Yangan-Tau (Republic of Bashkortostan).
Balneological	The main healing factor is mineral waters (for internal and external use)	Sol-Iletsk (Orenburg region); Belokurikha (Altai Republic); Shmakovka (Primorsky Territory); Nachiki (Kamchatka region); Sinegorsk (Sakhalin region); Teberda (Karachay-Cherkess Republic); Caucasian Mineral Waters (Stavropol Territory).
Climatic	The main healing factor is climate (coastal or mountainous)	Anapa (Krasnodar region); Sestroretsk (St. Petersburg); Teberda (Karachay-Cherkessia Republic).

Compiled by the authors based on Ministry of Economic Development of the Russian Federation data (<https://www.economy.gov.ru/material/directions/turizm/>)

Inbound medical tourism in Russia

With effective organisation, inbound medical tourism could represent a significant source of revenue for countries and can serve as an effective international specialisation niche. According to Rosstat data, the domestic market for paid medical services exceeded 1 trillion rubles in 2021 (Fig. 3). In the first two months (January - February) of 2024, the market volume amounted to 232.6 billion rubles, with the share of medical expenses in the total household expenditure structure not exceeding 10%.

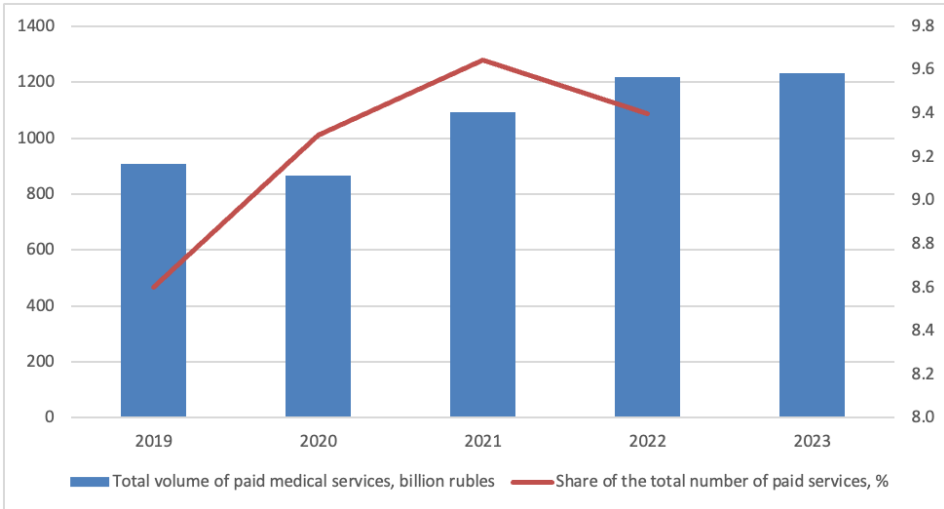


Fig. 3. Volume of the paid medical care market in Russia, 2019 – 2023.

Compiled by the authors based on Rosstat data (<https://rosstat.gov.ru/uslugi>)

In April 2019, the Ministry of Health of Russia launched the federal project "Development of Medical Services Export", aimed at increasing the volume of medical services export, which has shown positive dynamics in recent years (Fig. 4). As part of this project, the state portal "Russian Medical Tourism" (<https://russiamedtravel.ru/>) was created, which provides information on the organisation and prices of services in 252 clinics, presentations in Russian and English on the possibilities of exporting medical services in 71 subjects of the Russian Federation.

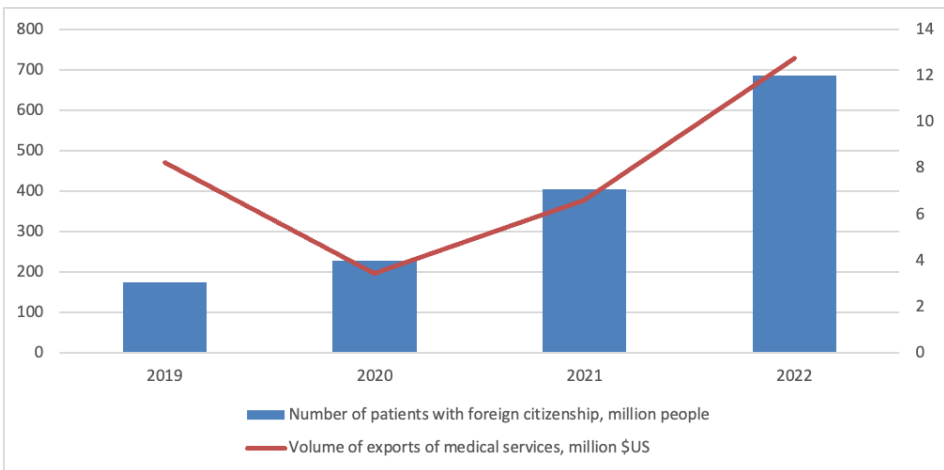


Fig. 4. Volume of medical services export and number of patients in Russia, 2019-2022. Compiled by the authors based on data from IV National Congress of Medical Services Export (<https://www.youtube.com/watch?v=9eKuvvxP4kzk>)

Fig. 5 illustrates the distribution of the share of revenues of distinct regions from providing medical services to foreign citizens for the year 2019, with a total amount of 128.38 billion US dollars, and we can observe the dominant role of major cities of Russia.

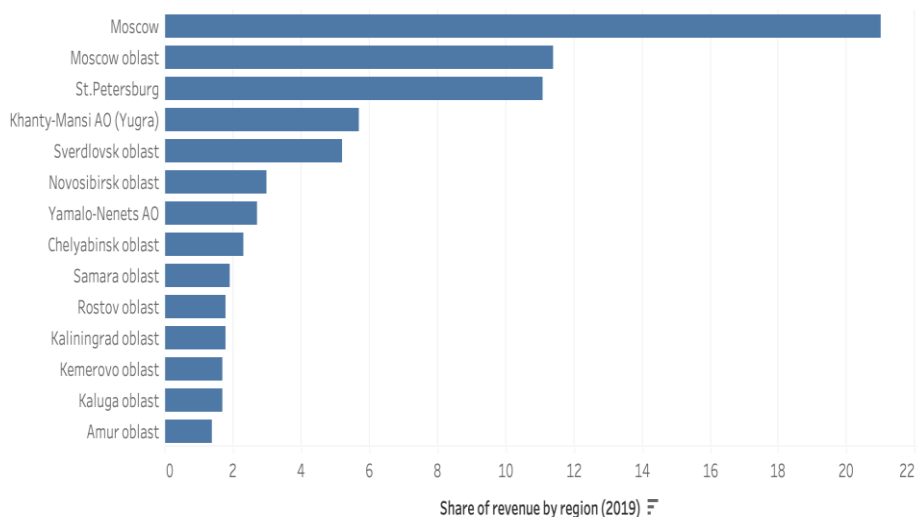


Fig. 5. Share of revenue by region, 2019. Compiled by the authors based on data from Marketing Research of Russian Medical Services Export

Among the foreign medical tourists coming to Russia, citizens of post-Soviet republics prevail. They are more informed about the achievements of Russian medicine, speak the Russian language, and can take advantage of relatively inexpensive transportation routes. The structure of medical tourist flows by country of origin for 2019 is presented in Fig. 6 Unfortunately, information about a later time is not available; presumably, it could have undergone some transformation due to known pandemic and geopolitical events.

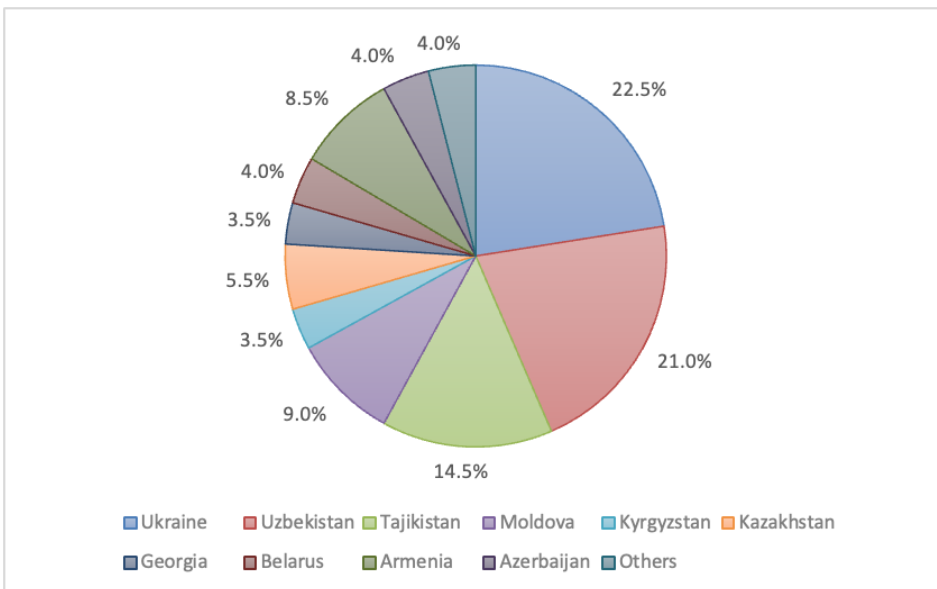


Fig. 6. Distribution of medical tourists in Russia by country of origin, 2019. Compiled by the authors based on Marketing Research of Russian Medical Services Export.

According to the IV National Congress on the Export of Medical Services, held during the "Russian Healthcare Week-2023", the revenue of Russian clinics from providing paid medical services to foreign citizens from January to July 2023 amounted to \$437.7 million, with more than half of it (\$271.9 million) obtained in the Central Federal District (CFD) of the Russian Federation (Fig. 5).

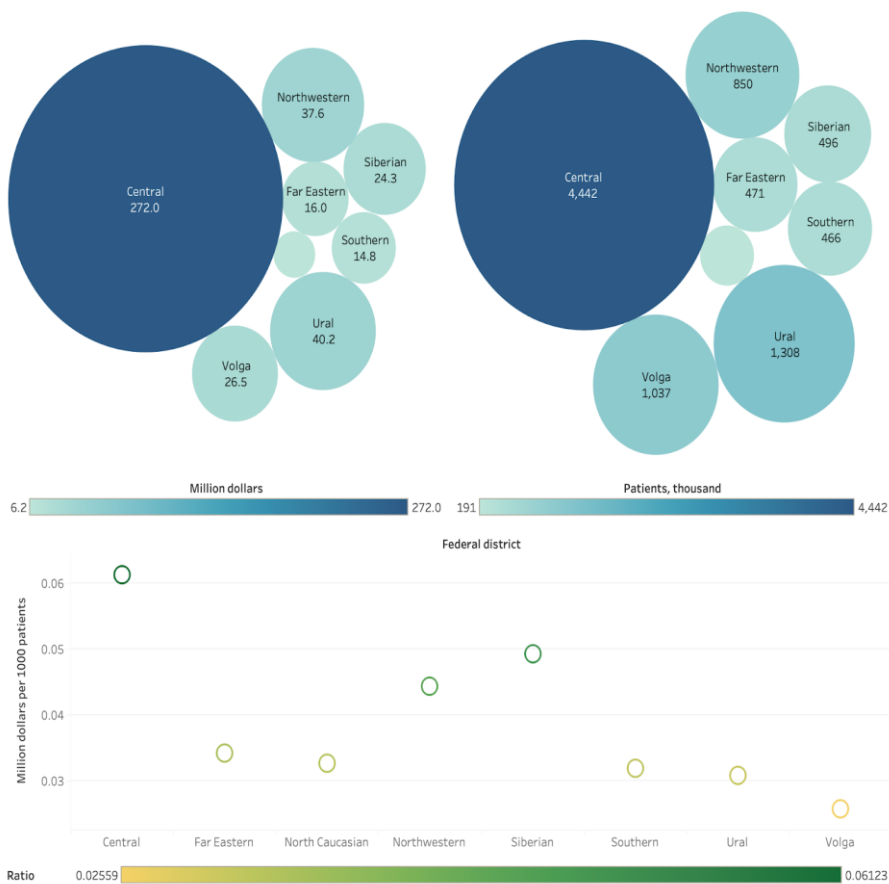


Fig. 7. Market of medical services export by Federal Districts of the Russian Federation, 2023. Left - number of foreign patients, thousands of people; right - amount of revenue, million US dollars. Down – amount of revenue per 1000 patients. Compiled by the authors based on data from data from IV National Congress of Medical Services Export

We aggregated data on the share of revenue for the 2019 year (available only on the regional level) into federal districts to be able to compare the data and determine not only the state but also the dynamics. The results are shown in Fig. 7. It should be noted that the data for 2019 is not suitable for an adequate comparison (regions form only 72% out of 100%,) so the results can be considered only as an approximate estimation.

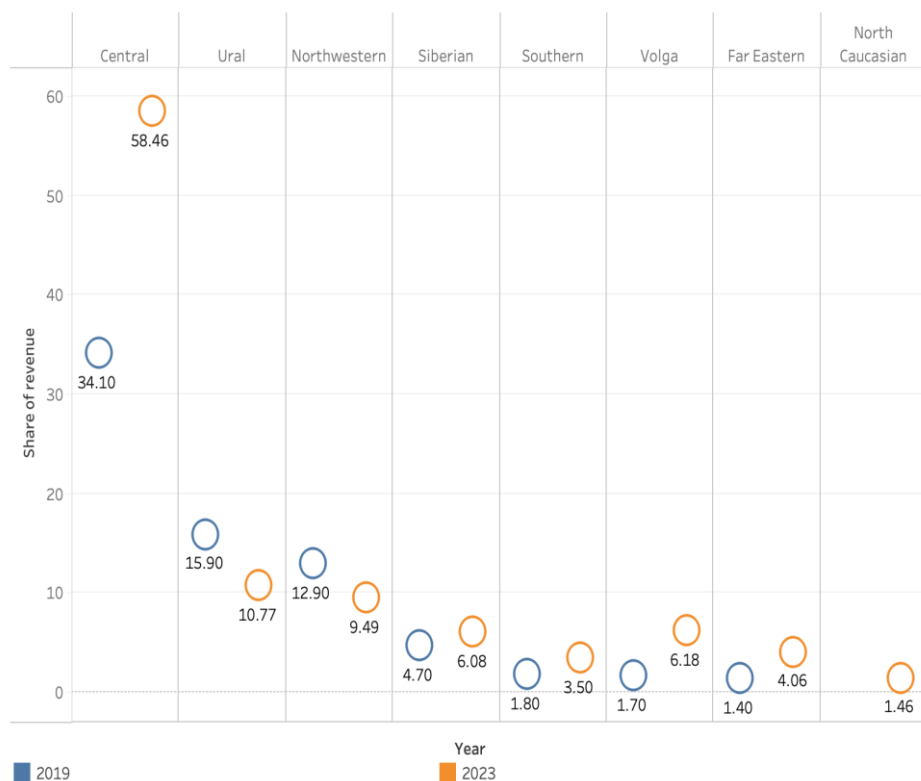


Fig. 8. Share of revenue by Federal Districts of the Russian Federation, 2019 vs 2023. Compiled by the authors

From the distribution presented in Fig. 7 and Fig. 8, it is evident that the hypertrophied role of the CFD is increasing alongside the highest level of economic efficiency. The difference between the revenues per patient in leading CFD and the lagging Volga Federal District is 2.4 times, which indicates the need to increase efficiency in the regions.

Research on medical tourism is important not only at the country and/or regional levels but also at the level of specific medical institutions. This is because patients often make decisions in favour of a specific clinic or even a particular doctor based on their reputation and the quality of medical services provided. The TOP-10 ranking by revenue from foreign patients is shown in Table 2.

From the table, it is evident that Moscow clinics play a dominant role, and there is also a clear trend of deconcentration: the share of the top 10 organisations decreased by 12% in 2023 compared to 2019. Both in 2019 and 2023, the leading position was held by the Fedorov Moscow National Medical Research Centre of Microsurgery of Eyes. That's why we examine the distribution of foreign patients in it more thoroughly (Fig. 9).

Table 2. Top clinics by revenue from foreign patients, 2019 and 2023

2019			2023		
№	Name	Share by revenue, %	№	Name	Share by revenue, %
1	S.N. Fedorov Moscow National Medical Research Centre of Microsurgery of Eyes	24.1	1	S.N. Fedorov Moscow National Medical Research Centre of Microsurgery of Eyes	18.9
2	Saint-Petersburg Research Institute of Ear, Throat, Nose and Speech	16.5	2	N.N. Blokhin National Medical Research Centre of Oncology	14.1
3	N.N. Blokhin National Medical Research Centre of Oncology	7.1	3	N.N. Burdenko National Medical Research Centre of Neurosurgery	8.8
4	State scientific Center of a Dermatovenereology and Cosmetology	6.9	4	A.N. Bakulev National Medical Research Centre of Cardiovascular Surgery	6
5	A.N. Bakulev National Medical Research Centre of Cardiovascular Surgery	5.9	5	I.M. Sechenov First Moscow State Medical University	5.1
6	National Medical Research Radiological Center	5.8	6	N.I. Pirogov Russian National Research Medical University	3.9
7	N.N. Burdenko National Medical Research Centre of Neurosurgery	4.7	7	N.N. Petrov National Medical Research Center of Oncology	3.5
8	I.M. Sechenov First Moscow State Medical University	3.8	8	Almazov National Medical Research Centre	3.1
9	All-Russian Center for Eye and Plastic Surgery	3.4	9	Pavlov First State Medical University	2.8
10	N.N. Petrov National Medical Research Center of Oncology	2.8	10	Meshalkin National Medical Research Center	2.6
Total of 10		81	Total of 10		68.8

Compiled by the authors based on data from data from IV National Congress of Medical Services Export and Marketing Research of Russian Medical Services Export

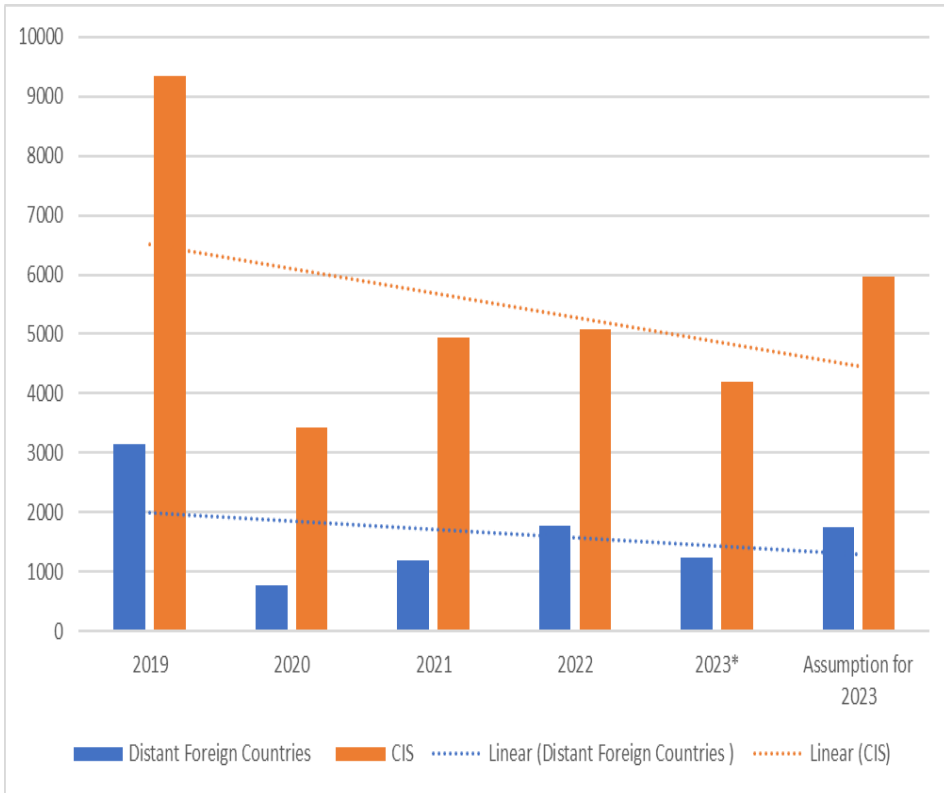


Fig. 9. Comparative dynamics of the number of patients from distant foreign countries and CIS countries in Fedorov Moscow National Medical Research Centre of Microsurgery of Eyes, number of patients. Data for 2023 from January to July. Compiled by the authors based on data from data from IV National Congress of Medical Services Export

We calculated the projected results for 2023, however, even they indicate a decline in the number of patients: for the CIS – 64% of the 2019 level, and the distant foreign countries – 56%. The largest number of patients in 2022 comes from Kazakhstan (1954), followed by Tajikistan (492), Uzbekistan (297), Kyrgyzstan (284), Ukraine (262), Sudan (207), Mongolia (176), Iraq (146), Belarus (137) and Azerbaijan (105) (IV National Congress..., 2023).

High positions in the ranking are occupied by regional medical institutions in St. Petersburg that utilise exclusive treatment methods: V.A. Almazov National Medical Research Centre of the Ministry of Health of Russia, Pavlov First Saint Petersburg State Medical University, R.R. Vreden National Medical Research Centre of Traumatology and Orthopedics, City Mariinsky Hospital, D.O. Ott National Medical Research Centre of Obstetrics, Gynecology, and Perinatology, and the N.N. Petrov National Medical Research Centre of Oncology. In other regions, medical tourists are attracted to the Federal Centre for Traumatology, Orthopedics, and Endoprosthetics in Cheboksary; the Department of Oncology and Radiotherapy of the E.N. Meshalkin National Medical Research Centre in Novosibirsk; the National Institute of Clinical and Experimental Lymphology in Novosibirsk; the Regional Oncological Dispensary in Yekaterinburg; the District Oncological Dispensary in

Chelyabinsk; the Russian Centre for Ophthalmic and Plastic Surgery (Muldashev Clinic) in Ufa; and the Kaluga Pain Clinic in Kaluga.

The Russian Scientific Centre for Restorative Traumatology and Orthopedics, named after Academician G.A. Ilizarov in Kurgan, is widely known worldwide. His example demonstrates a balanced management approach to the development of medical tourism. Here, doctors specialise not only in treating complex fractures and injuries but also in limb lengthening, burn treatment, and dental prosthetics. Foreign citizens are accompanied by a specially created international department whose specialists speak English, French, and Japanese. They also offer the service of "Individual non-medical patient support," which includes remote consultations with a doctor, document preparation for arrival and hospitalisation, and registration with the internal migration service established within the same international department.

Eliminating identified disproportion in the regional distribution of medical tourism organisations will help support the stability of the medical tourism industry in the country through the development of existing centres and the creation of new hubs for "green" economic growth. This can be achieved by creating stimulating programs for specific medical institutions in different regions, such as targeted investment programs, incentives for innovation, training initiatives, quality certification programs, promotional campaigns and so on.

Recommendations for the development of medical tourism in model groups of regions

Each type of region has distinctive features in terms of natural, socio-economic, and historical-cultural relationships. A comprehensive assessment allows for considering the advantages and disadvantages of strategic spatial planning. Three model groups of regions have been identified to determine priority directions for the strategic planning of domestic and inbound medical tourism.

The first group of regions already occupies a distinct niche in health and wellness tourism but also has growth potential and can capture a significant market share. For example, Krasnodar Krai (including popular resorts like Sochi, Anapa, and Gelendzhik) has a mild sea climate and developed infrastructure. Stavropol Krai is widely known for its healing mineral springs, and the Republic of Crimea has sanatoriums and resorts with therapeutic mud, mineral springs, and a unique climate. These are the most popular regions for wellness tourism, and the prospects for providing medical and therapeutic services here are associated with diversifying the specialisation of medical and wellness centres and introducing unique treatment methods, including for specific groups of tourists.

The second group of regions includes major medical centres with developed clinics and research institutions, a high level of medical services with innovative growth potential, and a significant market share (primarily Moscow and St. Petersburg). In these regions, it is important to form medical tourism clusters with unique treatment and rehabilitation technologies, develop special programs for foreign patients, and attract leading specialists and managers with knowledge of two or three foreign languages to implement these programs.

The third group of regions is the largest and most diverse. These regions also have growth potential but occupy a small market share. This group includes Pri-

morsky Krai (with potential for the development of maritime and ecological tourism due to its unique nature and proximity to other countries in the Asia-Pacific region) and the Republic of Altai (a combination of mountain climate, unique flora and fauna; established material and technical base for health and eco-tourism). Kurgan and Voronezh Oblasts (have the material and technical base for medical tourism, relatively high qualification of medical personnel), Irkutsk, Samara Oblasts, and several other subjects of the Russian Federation (have natural and cultural resources underutilised in health and wellness tourism). Developing medical tourism in these regions involves the need to find their competitive niche, actively attract investments, and improve marketing strategies and management.

Each of the constituent entities of the Russian Federation in the groups described above is characterised by unique opportunities but, at the same time, faces challenges and risks in the development of medical tourism. Regions with potential for health and wellness tourism development should focus on finding their competitive niche, attracting investments in the development of medical infrastructure (including through public-private partnerships), as well as training personnel and technology transfer. This will not only improve the quality of medical services but also make the region an attractive point of attraction for medical tourists from neighbouring regions. For the first two model groups, federal-level development programs are a priority, and for the third group, they are at the regional level.

Conclusions

Medical tourism is a new sector of the tourism industry, medicine, and the green economy. Its specific function is to provide services to the population both in conventional tourism and in clinical medicine. Originating in Europe, this type of tourism is now experiencing accelerated development in Asian countries, driven by lower prices for medical services with the same quality of treatment.

Given the focus of this article, several important questions remain beyond its scope that are crucial for medical tourism and need to be addressed in interdisciplinary groups with representatives from other scientific disciplines, such as legislation in the field of medical tourism, marketing and management of medical and related organisations, the impact of technological advancements, the role of insurance and financial mechanisms, cultural competence and sensitivity in providing medical services to diverse patient populations, development of sustainable and eco-friendly practices in medical tourism, etc.

Medical tourism in Russia currently occupies a small place in the overall tourist flow. The main obstacles to its development are limited state funding and underdeveloped infrastructure. Nevertheless, there are obvious positive trends in the development and territorial organisation of this relatively new sector of the country's economy in the service industry: the domestic flow of medical tourists is growing, and there is stable demand for certain types of medical services from foreign tourists. The main Russian destinations for medical tourism are the capital and major cities.

With unique technologies, highly qualified specialists, abundant health and recreational resources, and natural and cultural-historical heritage, Russia can become one of the leading countries in medical tourism. To make this a reality, it is necessary

to develop the corresponding infrastructure and establish intergovernmental and private companies.

As a result of the conducted series of studies, the authors have concluded the necessity to revise the approach to defining the level of research in the field of medical tourism, shifting it from a national to a local level. Research at the national level, and even more so at the global level, is more suitable for determining general directions for the development of health and wellness tourism. The optimal level of research in medical tourism is at the city, municipality, or specific medical institution level, as patients typically choose a specific clinic or even a specific doctor. An alternative could be studying medical tourism clusters, but in this case, there are difficulties in obtaining a unified database for comparative analysis. At the same time, the appearance of standardised statistics at the level of municipalities and/or cities is more realistic.

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